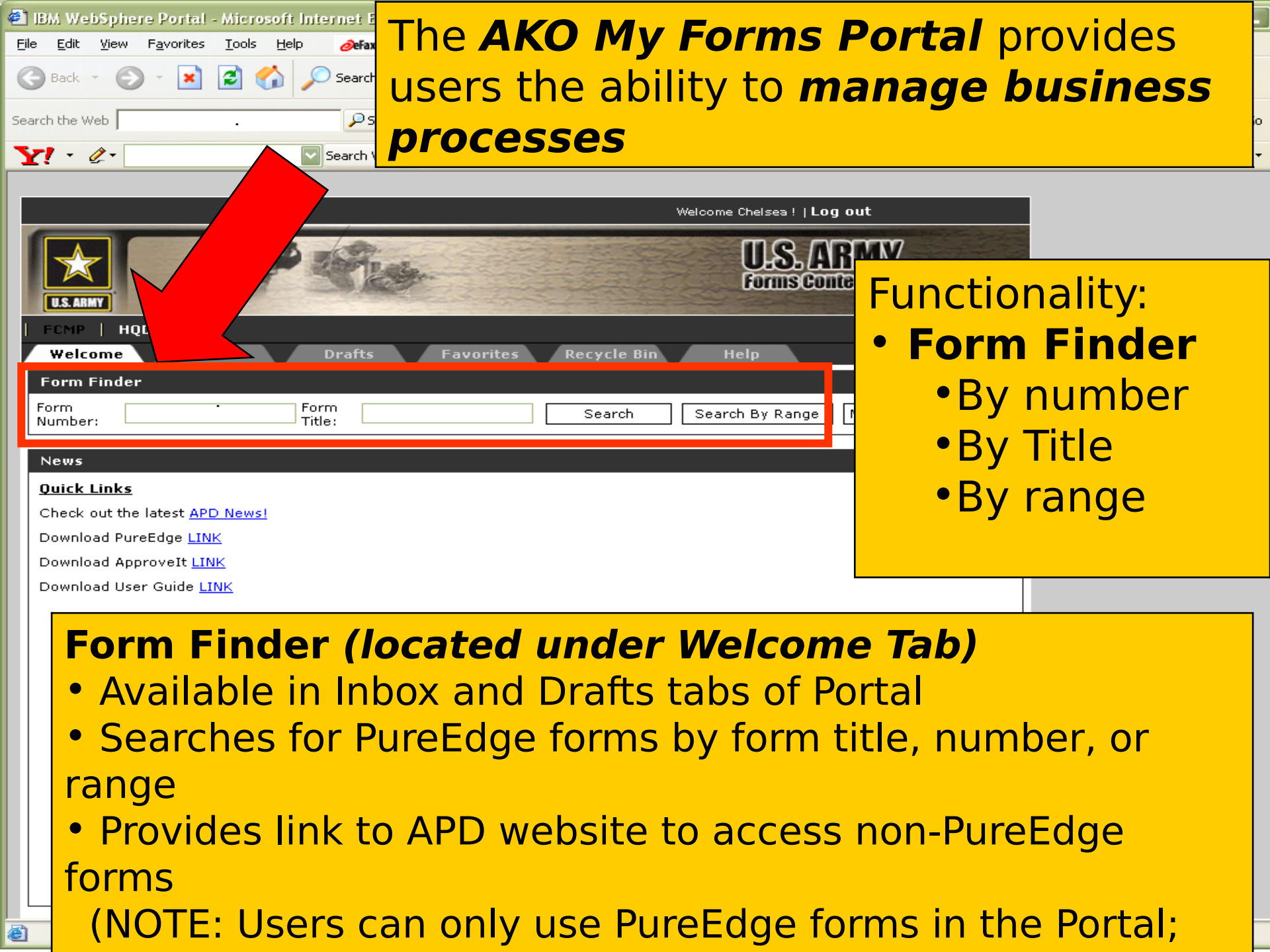
Electronic Military Evaluations: Training Package

Section 4: FCMP Portal Functions

Training Modules:

Section 1: Overview
Section 2: Changes in Evaluation Policy
Section 3: Changes in Evaluation Processing
Section 4: FCMP Portal Functions
Section 5: FCMP Evaluation Forms
Section 6: What does this version NOT have?
Section 7: Special issues
Section 8: Things to think about for a unit SOP/unit user manual
Section 9: AKO “My Forms” & Daily Business

The ***AKO My Forms Portal*** provides users the ability to ***manage business processes***



Functionality:

- **Form Finder**
  - By number
  - By Title
  - By range

Form Finder *(located under Welcome Tab)*

- Available in Inbox and Drafts tabs of Portal
- Searches for PureEdge forms by form title, number, or range
- Provides link to APD website to access non-PureEdge forms

(NOTE: Users can only use PureEdge forms in the Portal;

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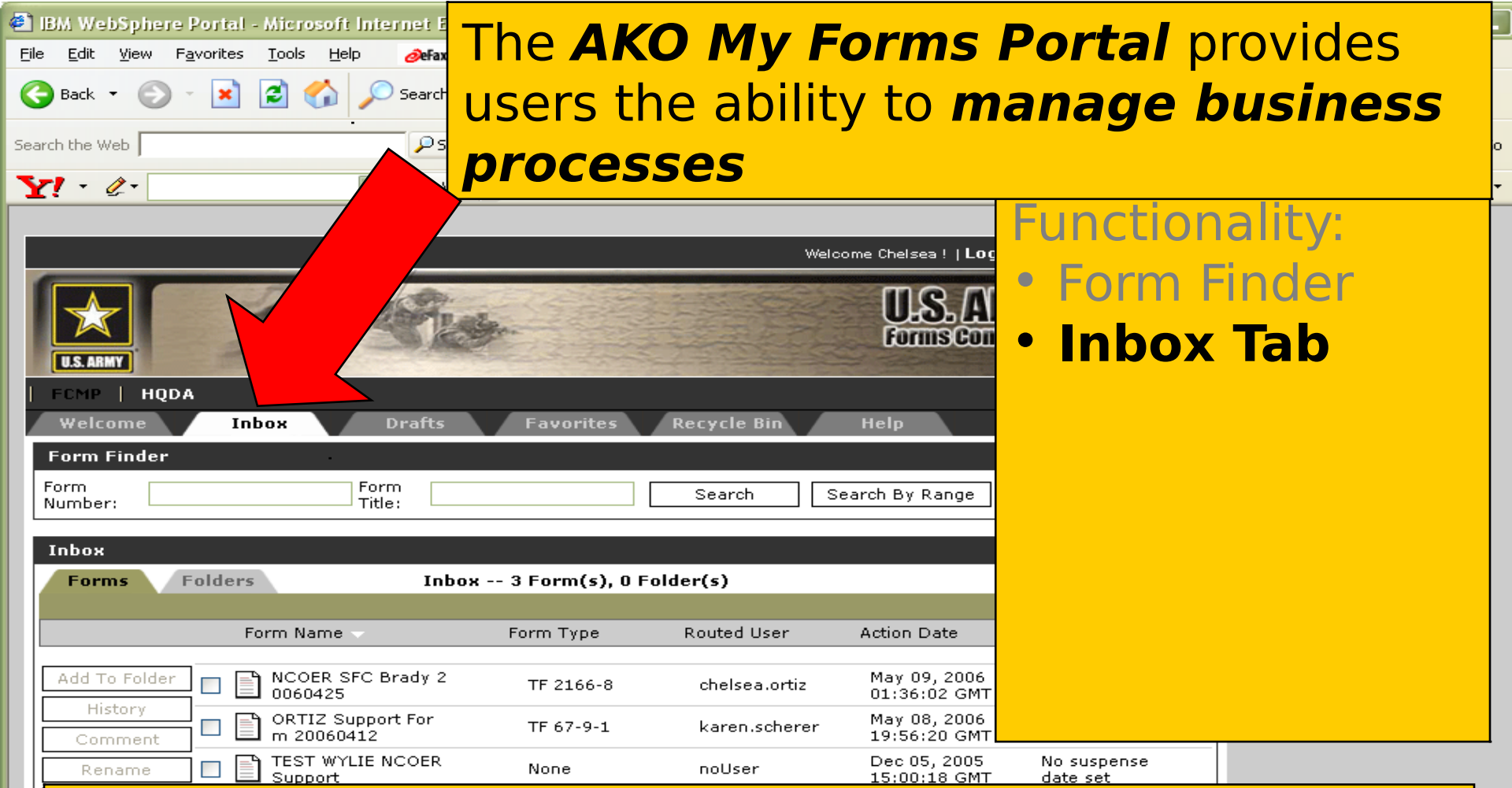
Functionality:
- Form Finder
- **Inbox Tab**

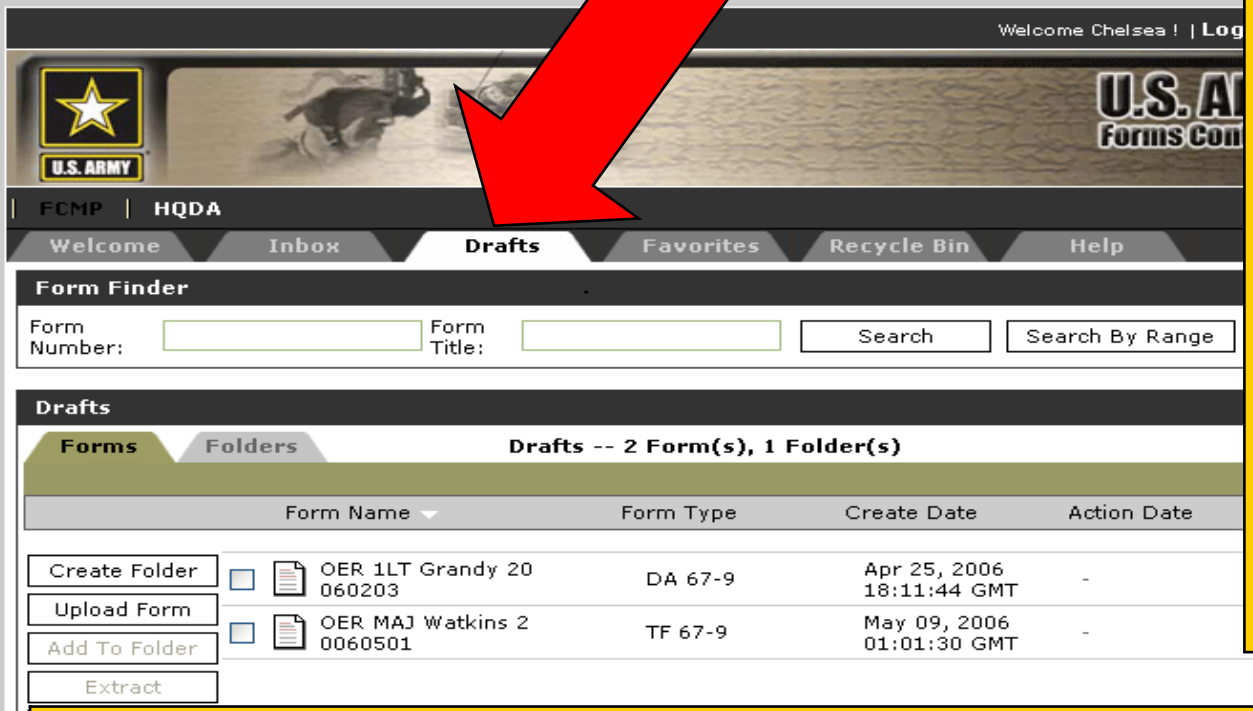


Inbox Tab
- Shows forms and folders that have been ***routed to*** the user
- User can sort forms by name, type, sender, received date
- Action buttons perform form management functions
- Special Action Buttons perform functions unique to certain

The ***AKO My Forms Portal*** provides users the ability to ***manage business processes***

Functionality:

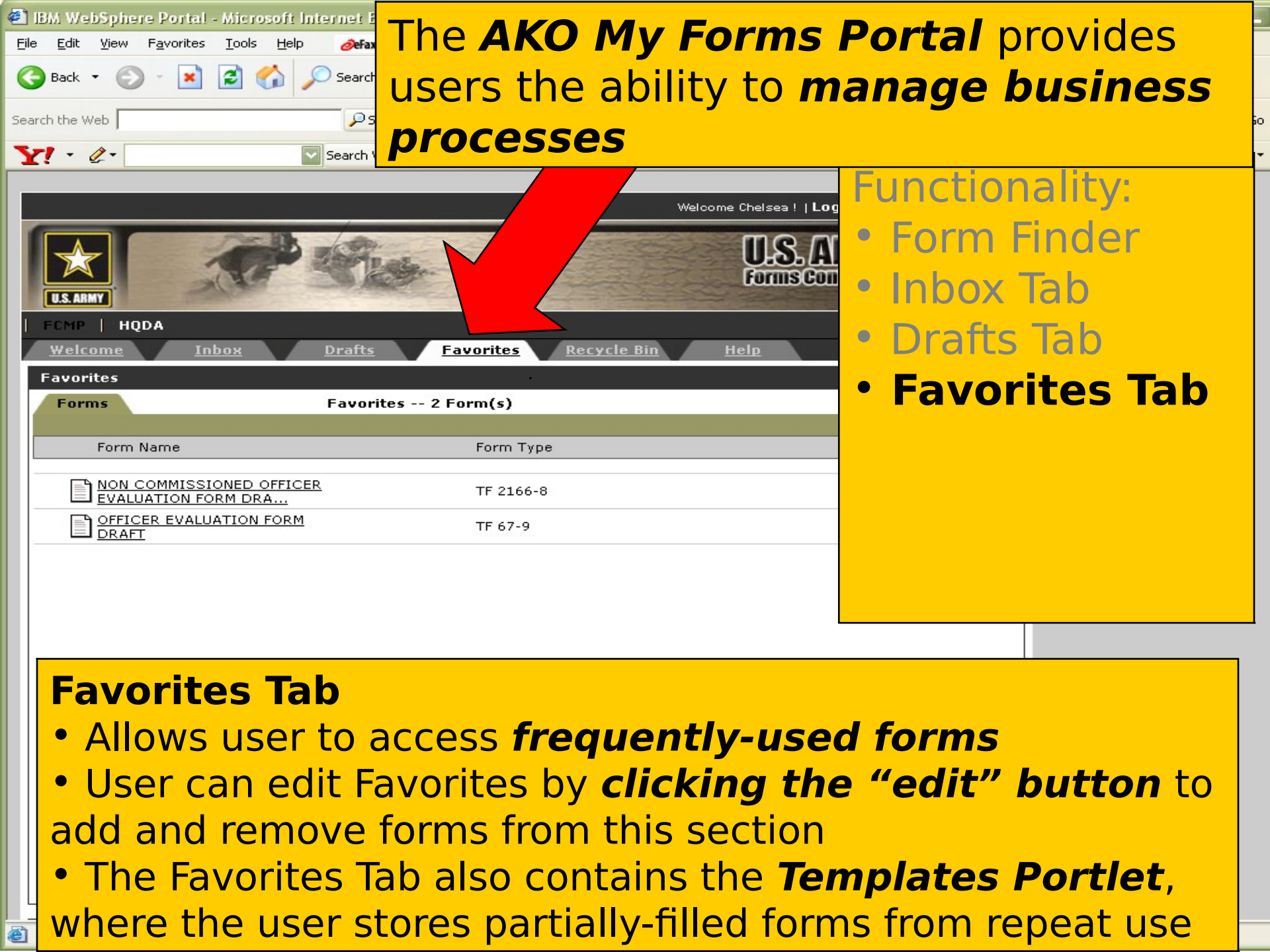
- Form Finder
- Inbox Tab
- **Drafts Tab**



Drafts Tab

- Shows forms and folders that have been ***created or uploaded by*** the user
- In addition to same Action Buttons as Inbox Tab, includes the ***Create Folder*** and ***Upload Form*** buttons
- Evals created from support forms will also appear in the

The ***AKO My Forms Portal*** provides users the ability to ***manage business processes***



Functionality:

- Form Finder
- Inbox Tab
- Drafts Tab
- **Favorites Tab**

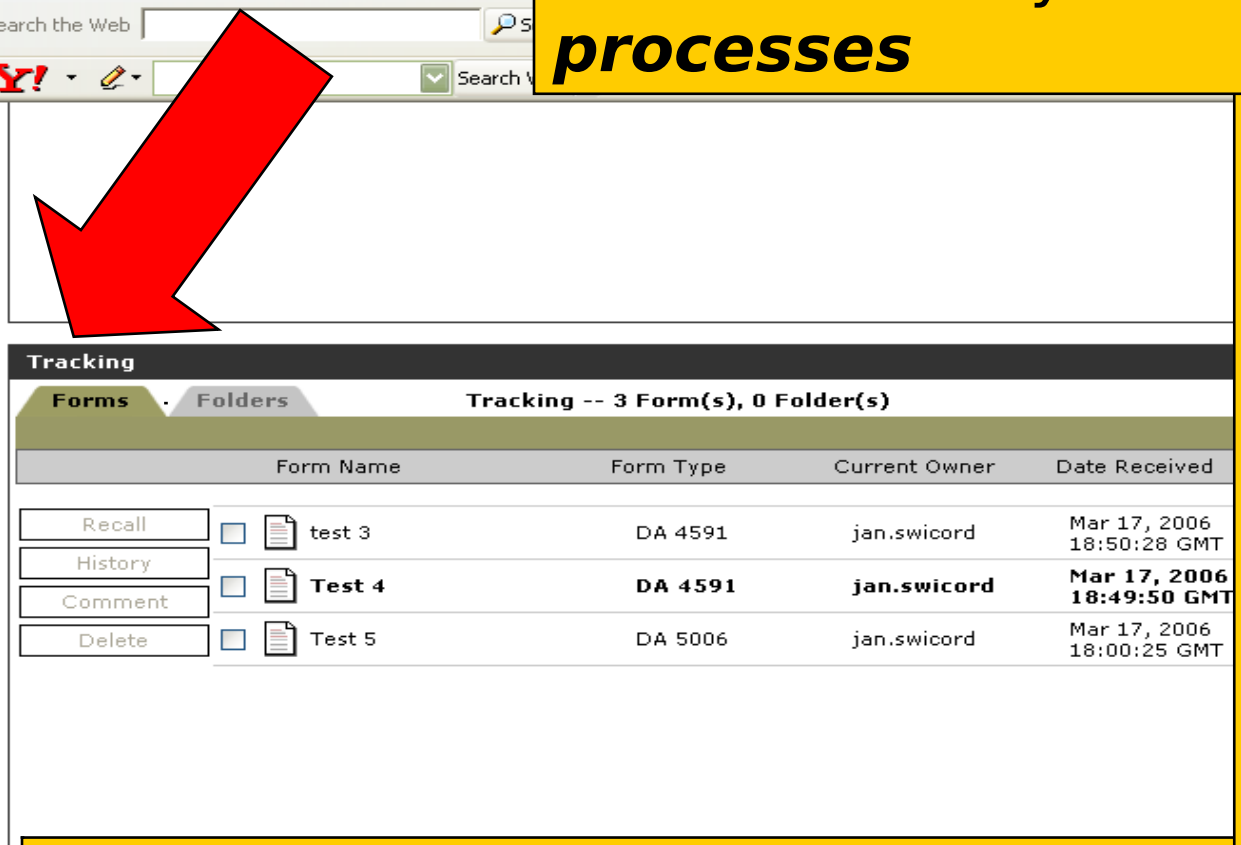
Favorites Tab

- Allows user to access ***frequently-used forms***
- User can edit Favorites by ***clicking the "edit" button*** to add and remove forms from this section
- The Favorites Tab also contains the ***Templates Portlet***, where the user stores partially-filled forms from repeat use

The ***AKO My Forms Portal*** provides users the ability to ***manage business processes***

Functionality:

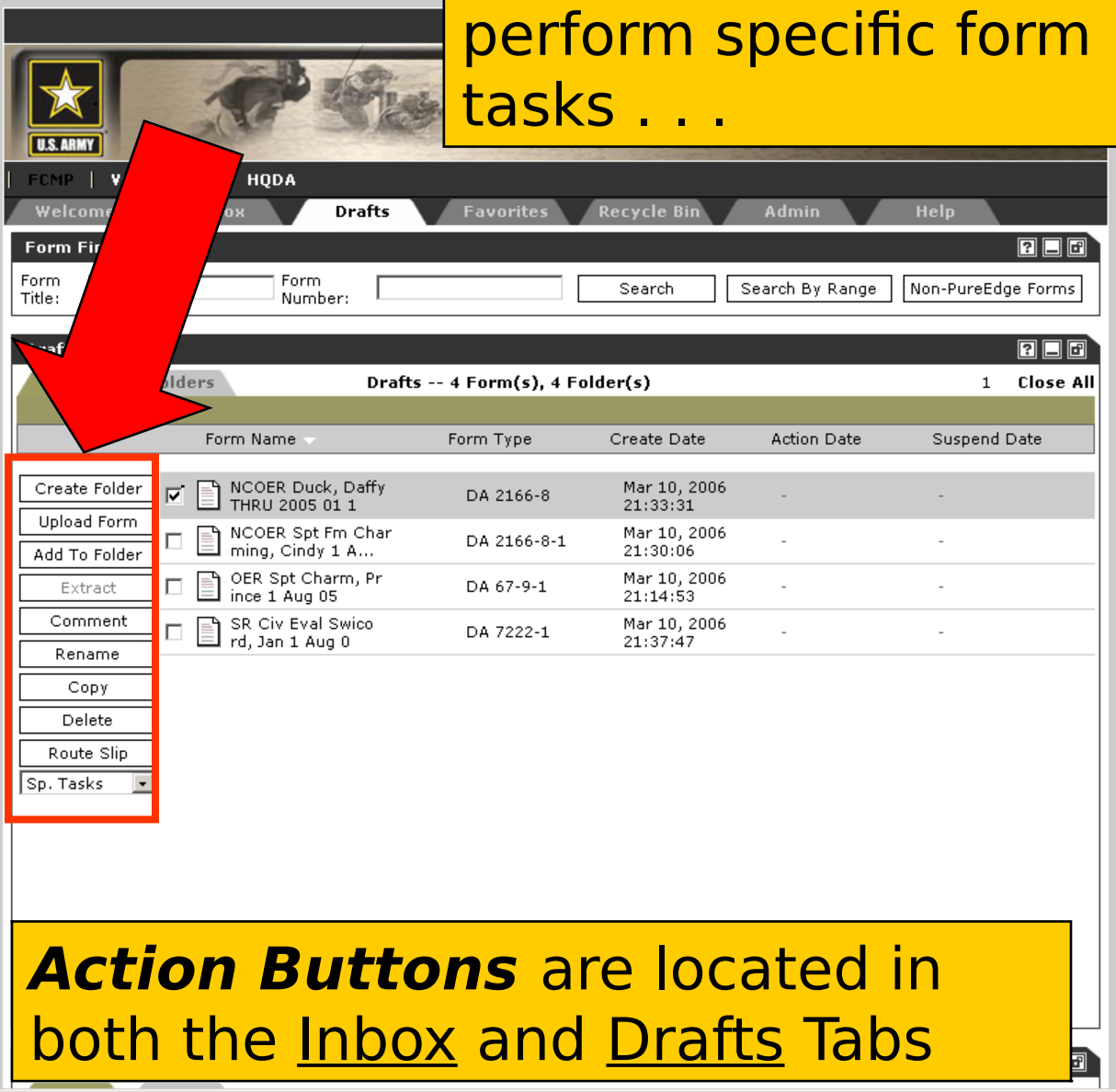
- Form Finder
- Inbox Tab
- Drafts Tab
- Favorites Tab
- **Tracking Portlet**



Tracking Portlet *(located at bottom of Inbox and Drafts Tabs)*

- Allows you to track ***forms that you have sent*** to other users
- Shows ***info copies*** that have been sent to you
- Forms in the Tracking Portlet are ***read-only*** and ***dynamic***

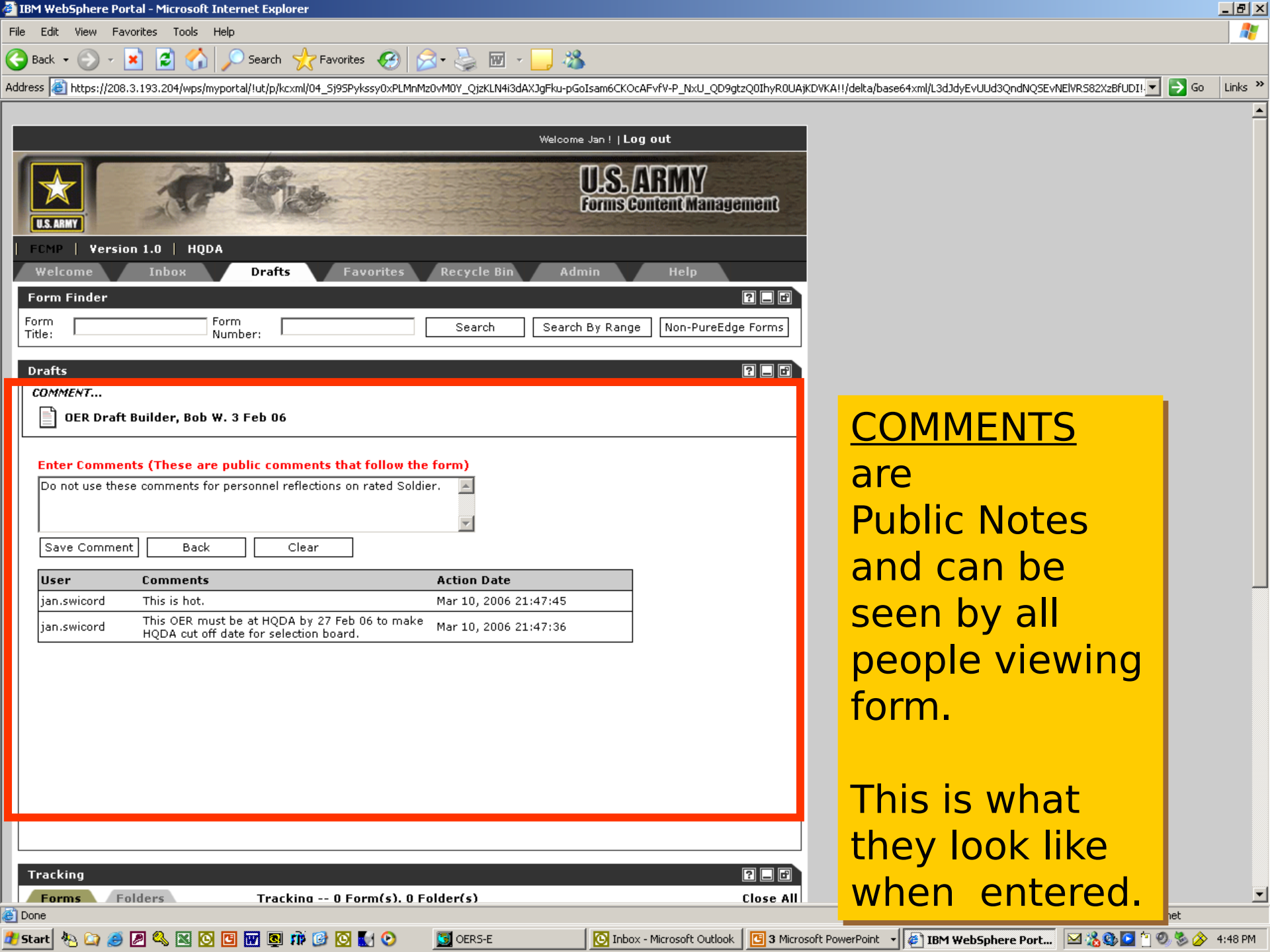
The ***Action Buttons*** allow users to perform specific form management tasks . . .

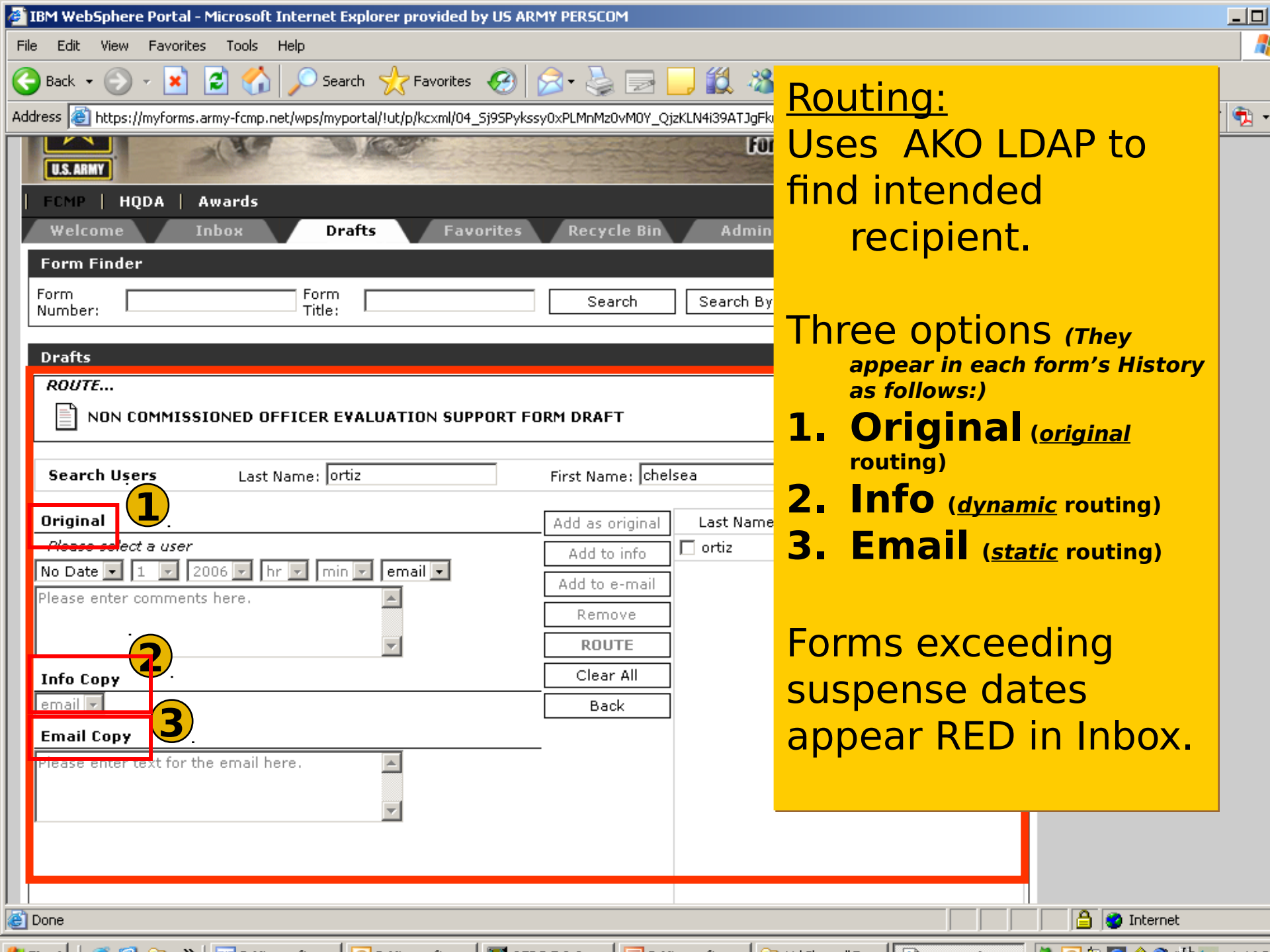


Action Buttons are located in both the Inbox and Drafts Tabs

Functions Include:

- Adding to Folder
- History
- Comments
- Routing to other users
- Deleting (if you created it)
- Renaming
- Copying


IBM WebSphere Portal - Microsoft Internet Explorer
Welcome Jan ! | Log out
U.S. ARMY
Forms Content Management
FCMP | Version 1.0 | HQDA
Welcome
Inbox
Drafts
Favorites
Recycle Bin
Admin
Help
Form Finder
Form Title:
Form Number:
Search
Search By Range
Non-PureEdge Forms
Drafts
COMMENT...
OER Draft Builder, Bob W. 3 Feb 06
Enter Comments (These are public comments that follow the form)
Do not use these comments for personnel reflections on rated Soldier.
Save Comment
Back
Clear
User
Comments
Action Date
jan.swicord
This is hot.
Mar 10, 2006 21:47:45
jan.swicord
This OER must be at HQDA by 27 Feb 06 to make HQDA cut off date for selection board.
Mar 10, 2006 21:47:36
Tracking
Forms
Folders
Tracking -- 0 Form(s), 0 Folder(s)
Close All
COMMENTS are Public Notes and can be seen by all people viewing form.
This is what they look like when entered.



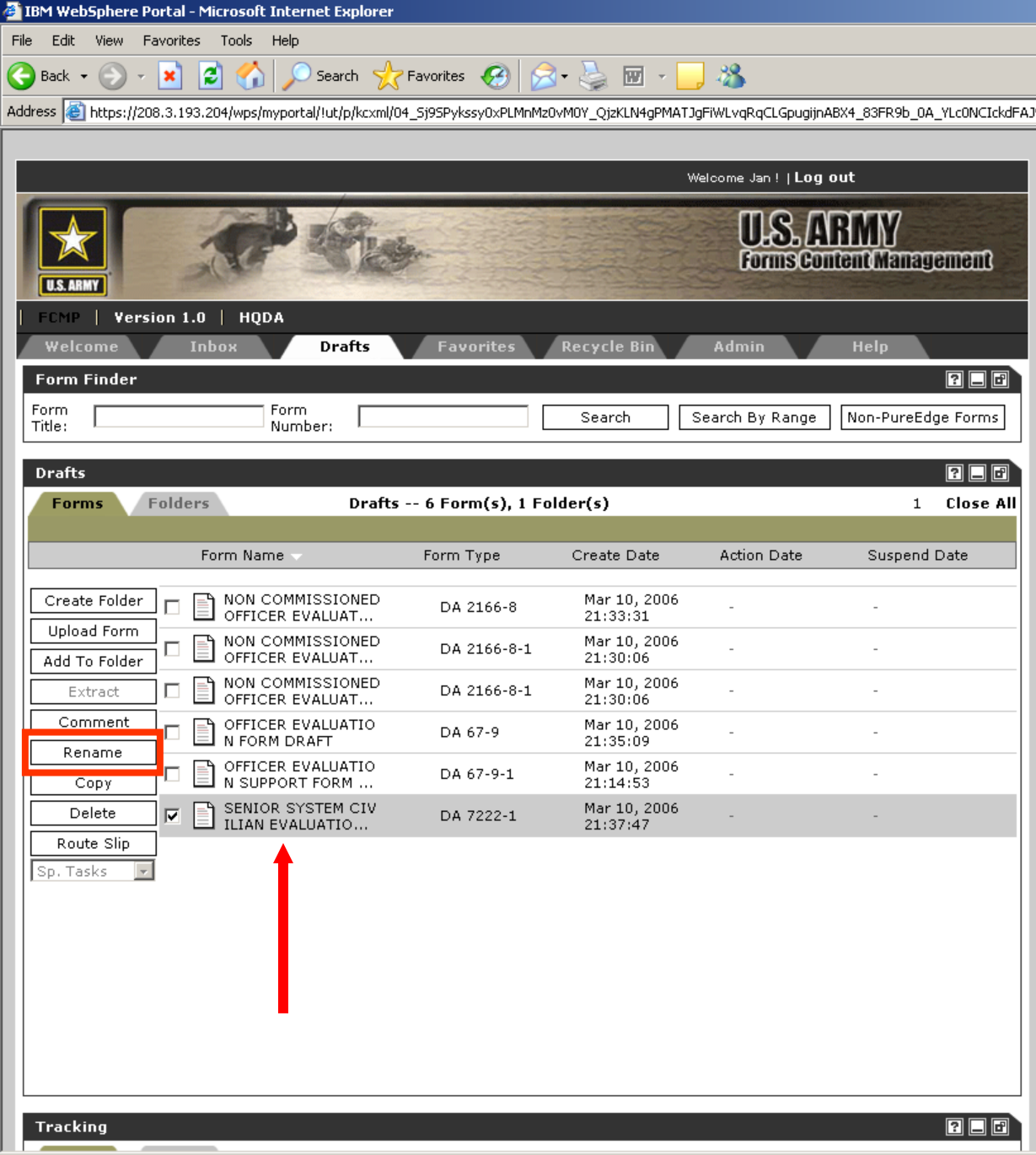
Routing:

Uses AKO LDAP to find intended recipient.

Three options ***(They appear in each form's History as follows:)***

1. **Original** (***original*** **routing)**
2. **Info** (***dynamic*** **routing)**
3. **Email** (***static*** **routing)**

Forms exceeding suspense dates appear RED in Inbox.

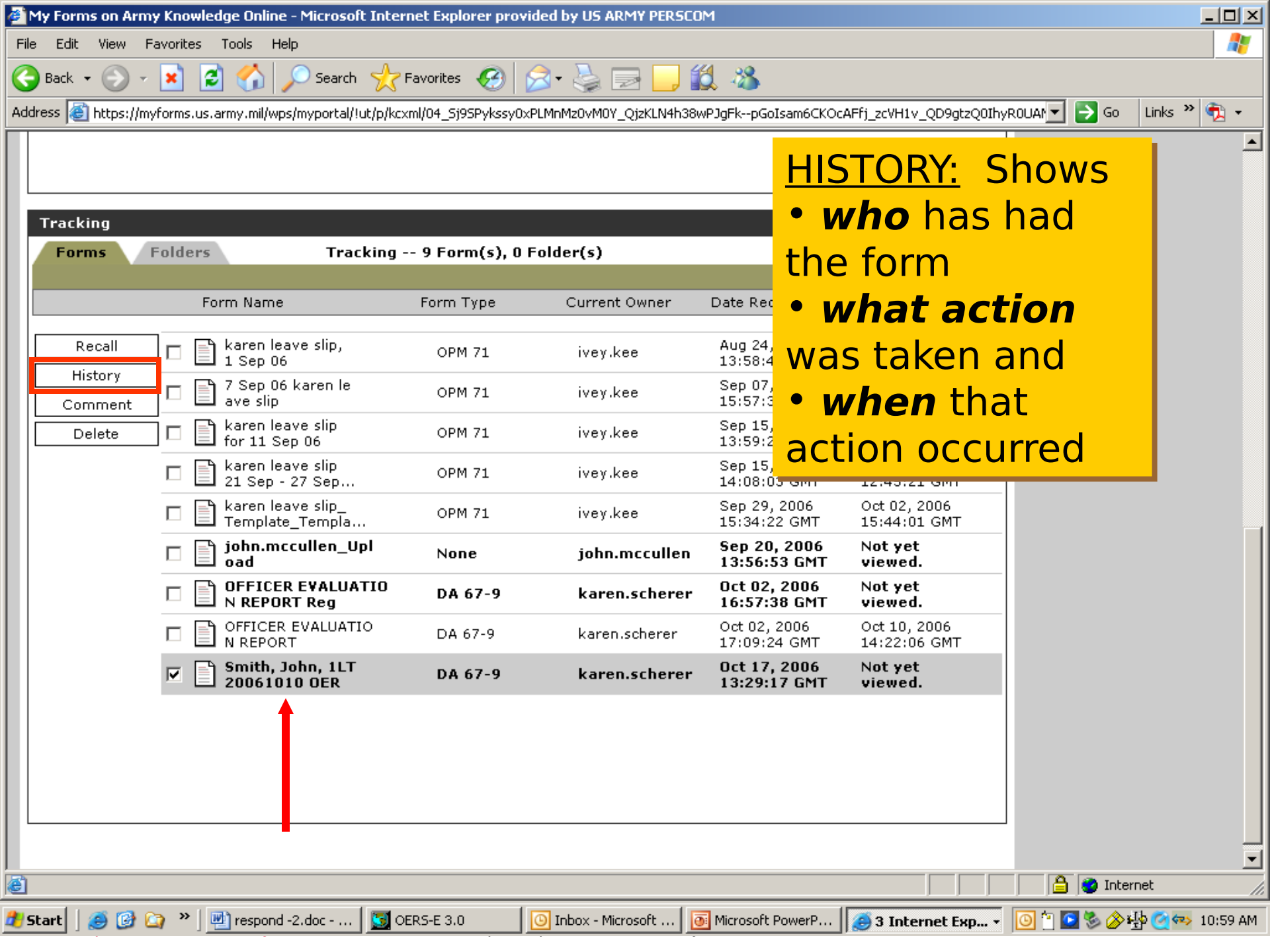


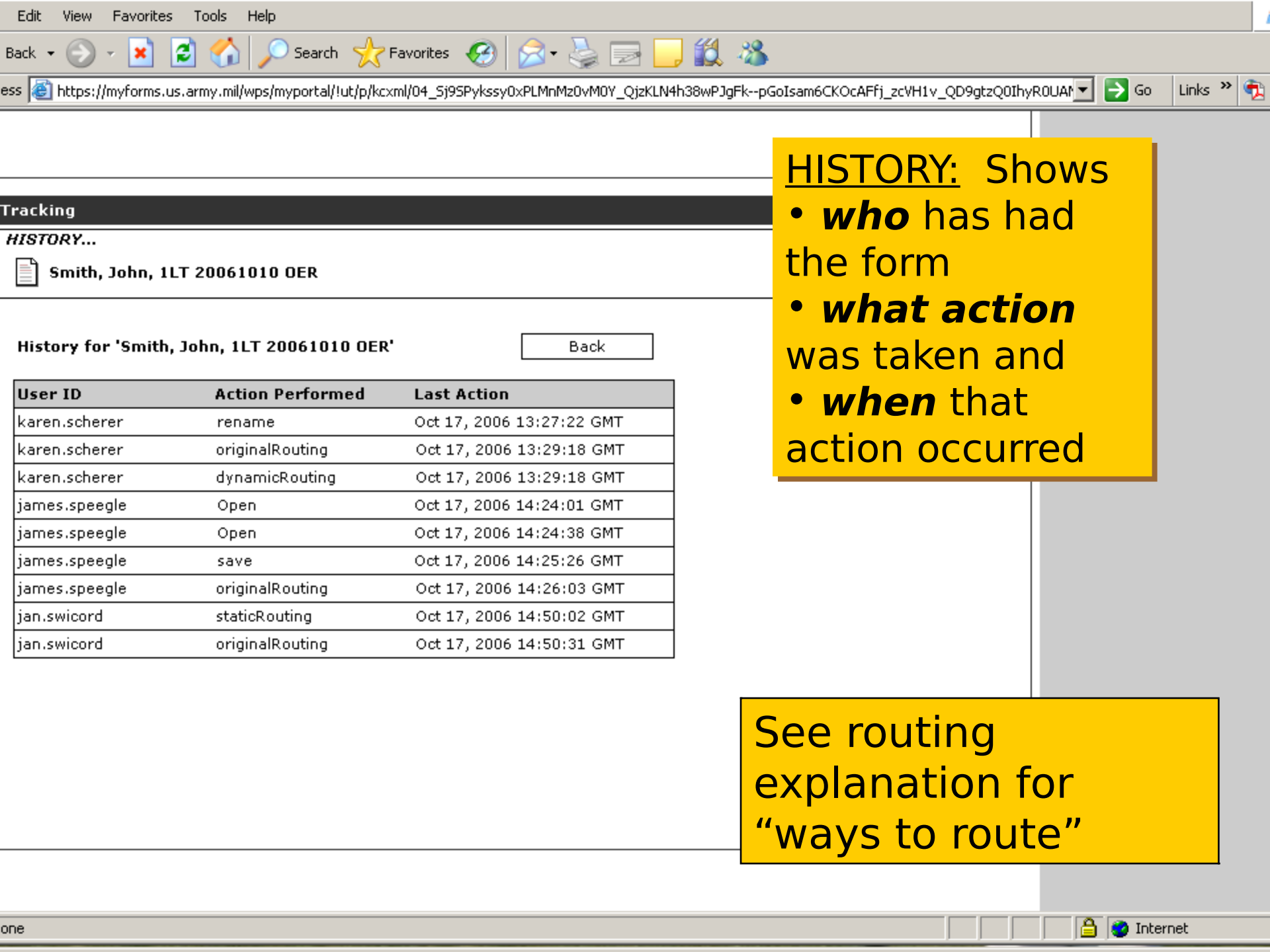
RENAMING:

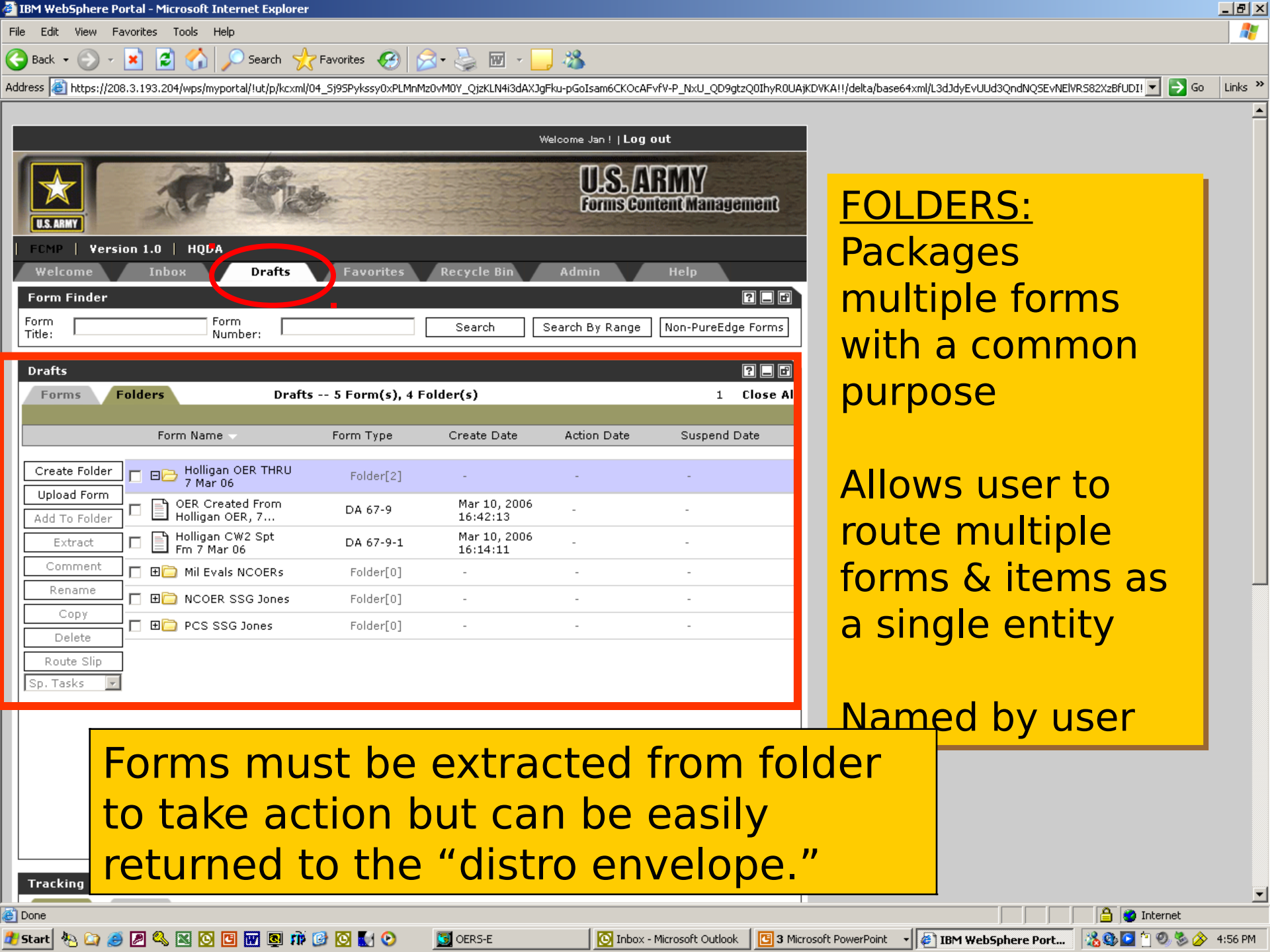
You should rename documents after starting a form.

EXAMPLE:

What you might get if you don't rename forms to something identifiable.


My Forms on Army Knowledge Online - Microsoft Internet Explorer provided by US ARMY PERSCOM
File Edit View Favorites Tools Help
Back Search Favorites
Address https://myforms.us.army.mil/wps/myportal/!ut/p/kcxml/04_Sj9SPykssy0xPLMnMz0vM0Y_QjzKLN4h38wPJgFk--pGoIsam6CKOcAFfj_zcVH1v_QD9gtzQ0IhyR0UAM
Go Links
Tracking
Forms Folders
Tracking -- 9 Form(s), 0 Folder(s)
Form Name Form Type Current Owner Date Rec
Recall
History
Comment
Delete
karen leave slip, 1 Sep 06 OPM 71 ivey.kee Aug 24, 13:58:4
7 Sep 06 karen le ave slip OPM 71 ivey.kee Sep 07, 15:57:3
karen leave slip for 11 Sep 06 OPM 71 ivey.kee Sep 15, 13:59:2
karen leave slip 21 Sep - 27 Sep... OPM 71 ivey.kee Sep 15, 14:08:03 GMT
karen leave slip_ Template_Templa... OPM 71 ivey.kee Sep 29, 2006 15:34:22 GMT Oct 02, 2006 15:44:01 GMT
john.mccullen_Upl oad None john.mccullen Sep 20, 2006 13:56:53 GMT Not yet viewed.
OFFICER EVALUATIO N REPORT Reg DA 67-9 karen.scherer Oct 02, 2006 16:57:38 GMT Not yet viewed.
OFFICER EVALUATIO N REPORT DA 67-9 karen.scherer Oct 02, 2006 17:09:24 GMT Oct 10, 2006 14:22:06 GMT
Smith, John, 1LT 20061010 OER DA 67-9 karen.scherer Oct 17, 2006 13:29:17 GMT Not yet viewed.
HISTORY: Shows
• who has had the form
• what action was taken and
• when that action occurred
Internet
Start
respond -2.doc - ...
OERS-E 3.0
Inbox - Microsoft ...
Microsoft PowerP...
3 Internet Exp...
10:59 AM


Edit View Favorites Tools Help
Back Search Favorites
https://myforms.us.army.mil/wps/myportal/!ut/p/kcxml/04_Sj9SPykssy0xPLMnMz0vM0Y_QjzKLN4h38wPJgFk--pGoIsam6CKOcAFfj_zcVH1v_QD9gtzQ0IhyR0UAN
Go Links
Tracking
HISTORY...
Smith, John, 1LT 20061010 OER
History for 'Smith, John, 1LT 20061010 OER'
Back
User ID | Action Performed | Last Action
karen.scherer | rename | Oct 17, 2006 13:27:22 GMT
karen.scherer | originalRouting | Oct 17, 2006 13:29:18 GMT
karen.scherer | dynamicRouting | Oct 17, 2006 13:29:18 GMT
james.speegle | Open | Oct 17, 2006 14:24:01 GMT
james.speegle | Open | Oct 17, 2006 14:24:38 GMT
james.speegle | save | Oct 17, 2006 14:25:26 GMT
james.speegle | originalRouting | Oct 17, 2006 14:26:03 GMT
jan.swicord | staticRouting | Oct 17, 2006 14:50:02 GMT
jan.swicord | originalRouting | Oct 17, 2006 14:50:31 GMT
HISTORY: Shows
• who has had the form
• what action was taken and
• when that action occurred
See routing explanation for “ways to route”
one
Internet



FOLDERS:

Packages multiple forms with a common purpose

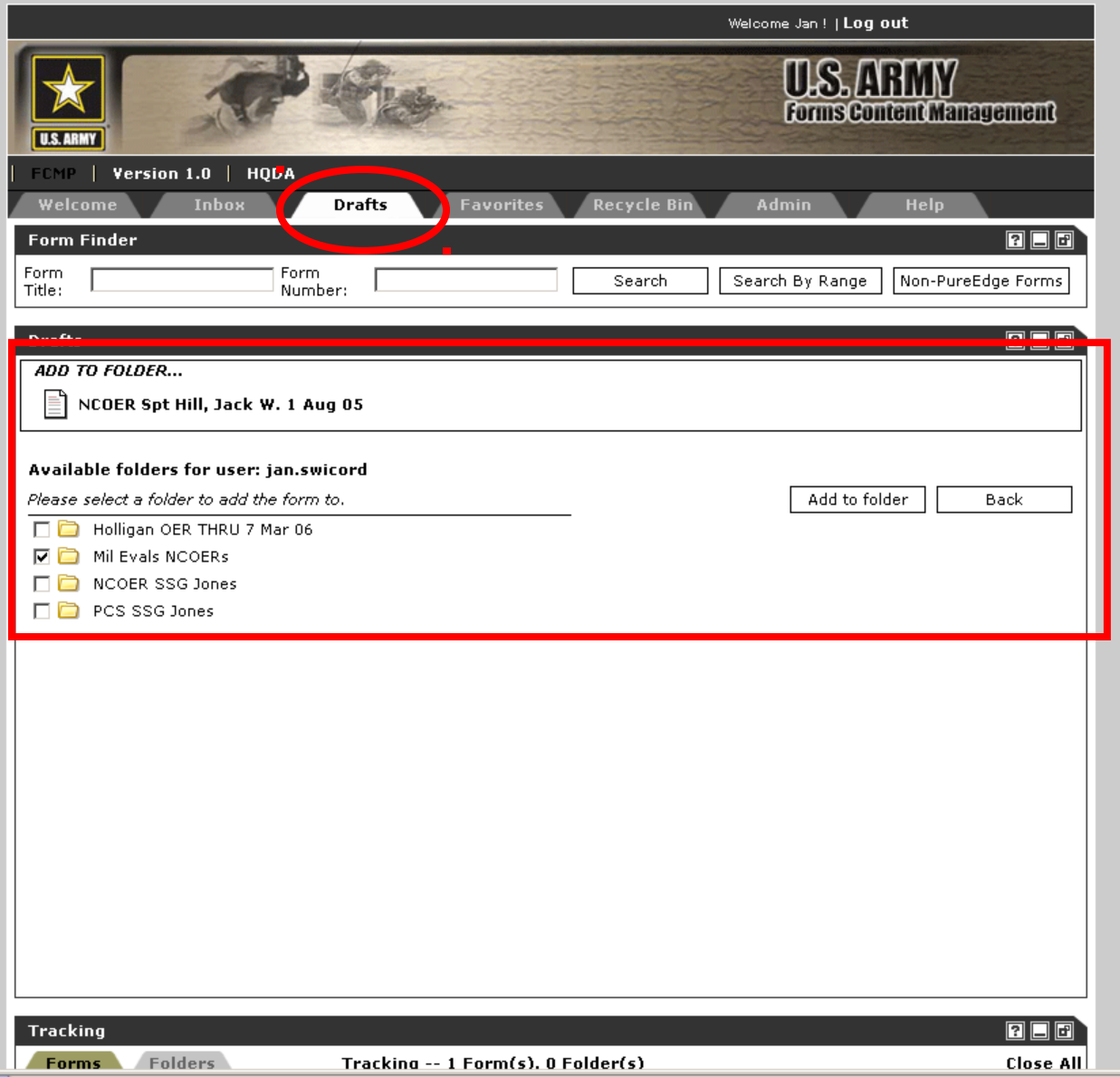
Allows user to route multiple forms & items as a single entity

Named by user

Forms must be extracted from folder to take action but can be easily returned to the “distro envelope.”

FOLDERS:

Can be named appropriate to the forms the folder will contain.

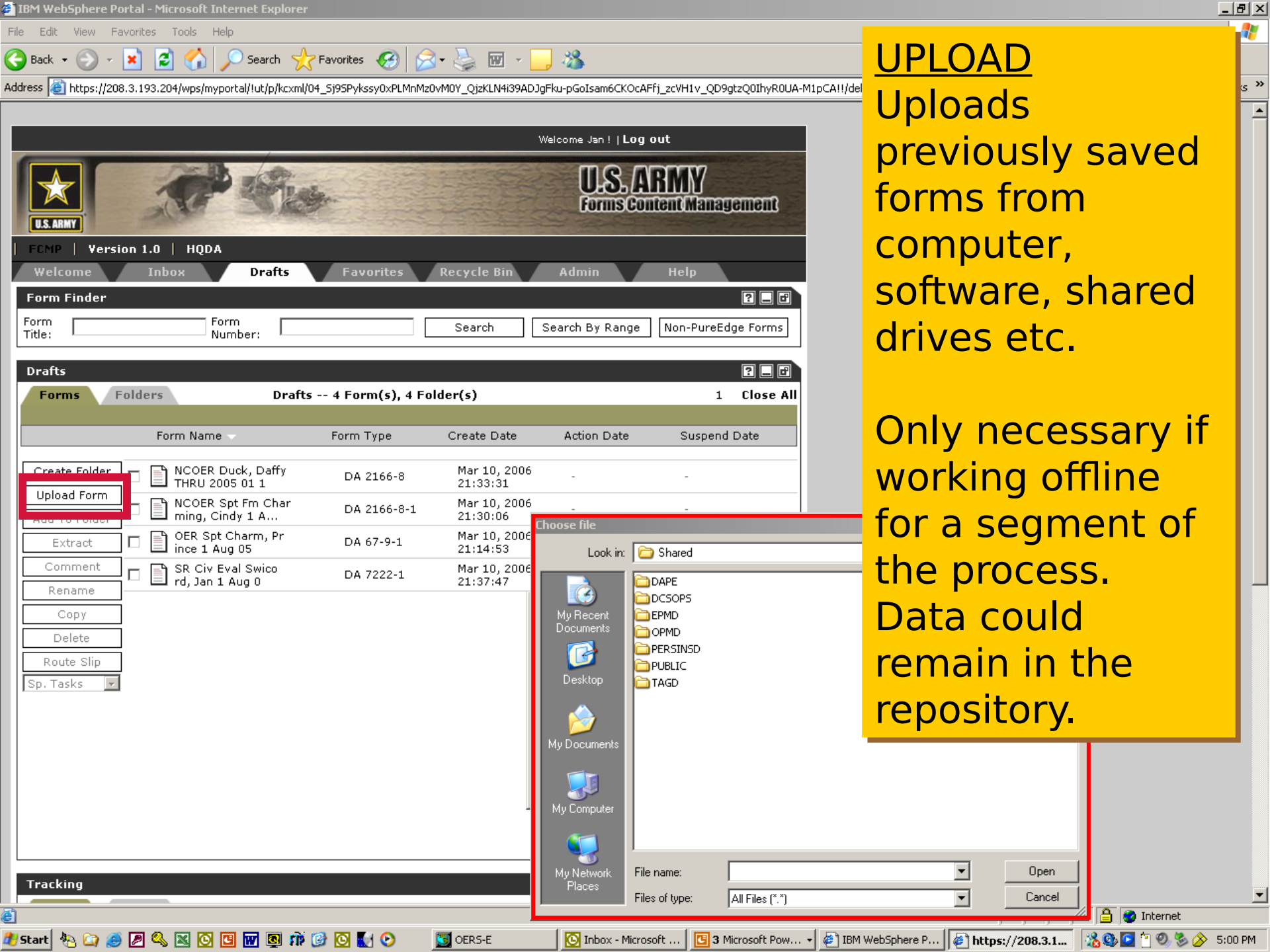


FOLDERS:

Adding a document to an existing folder.

Examples of folder use:_

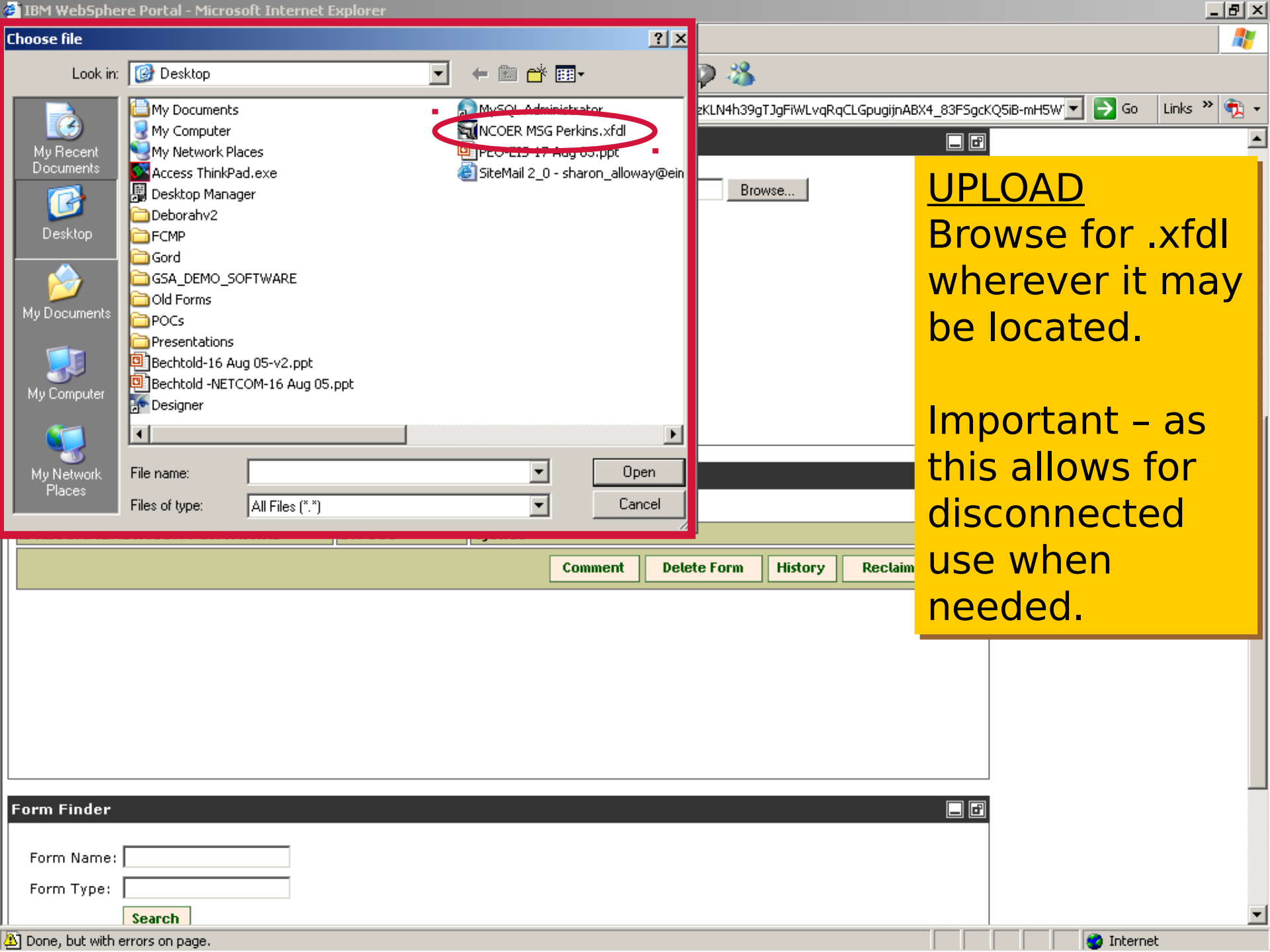
- Eval & Spt form through rating officials.
- Multiple 638s for same event.
- PCS documents.



UPLOAD

Uploads previously saved forms from computer, software, shared drives etc.

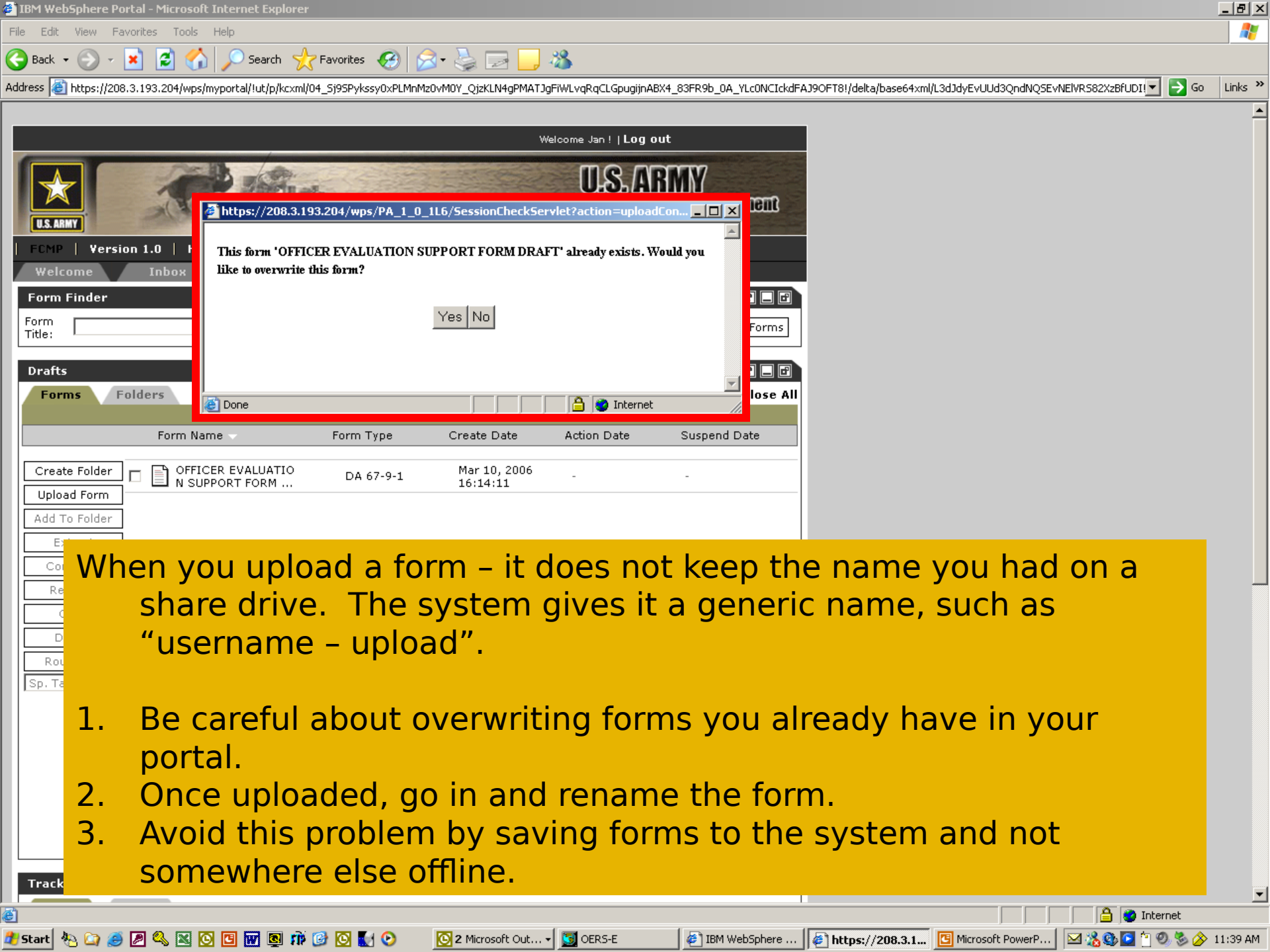
Only necessary if working offline for a segment of the process. Data could remain in the repository.



UPLOAD

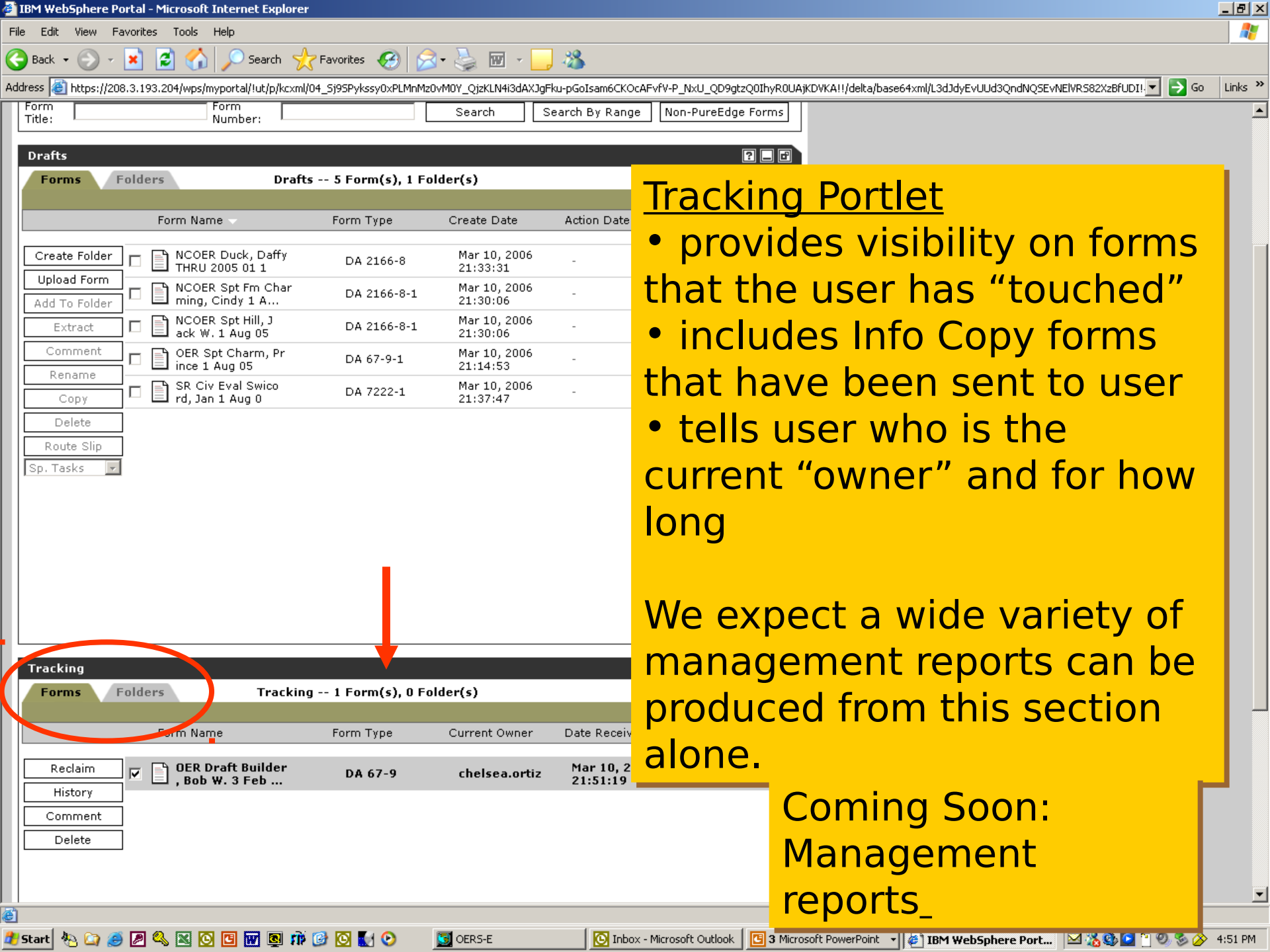
Browse for .xfdl wherever it may be located.

Important – as this allows for disconnected use when needed.



When you upload a form – it does not keep the name you had on a share drive. The system gives it a generic name, such as "username – upload".

1. Be careful about overwriting forms you already have in your portal.
2. Once uploaded, go in and rename the form.
3. Avoid this problem by saving forms to the system and not somewhere else offline.

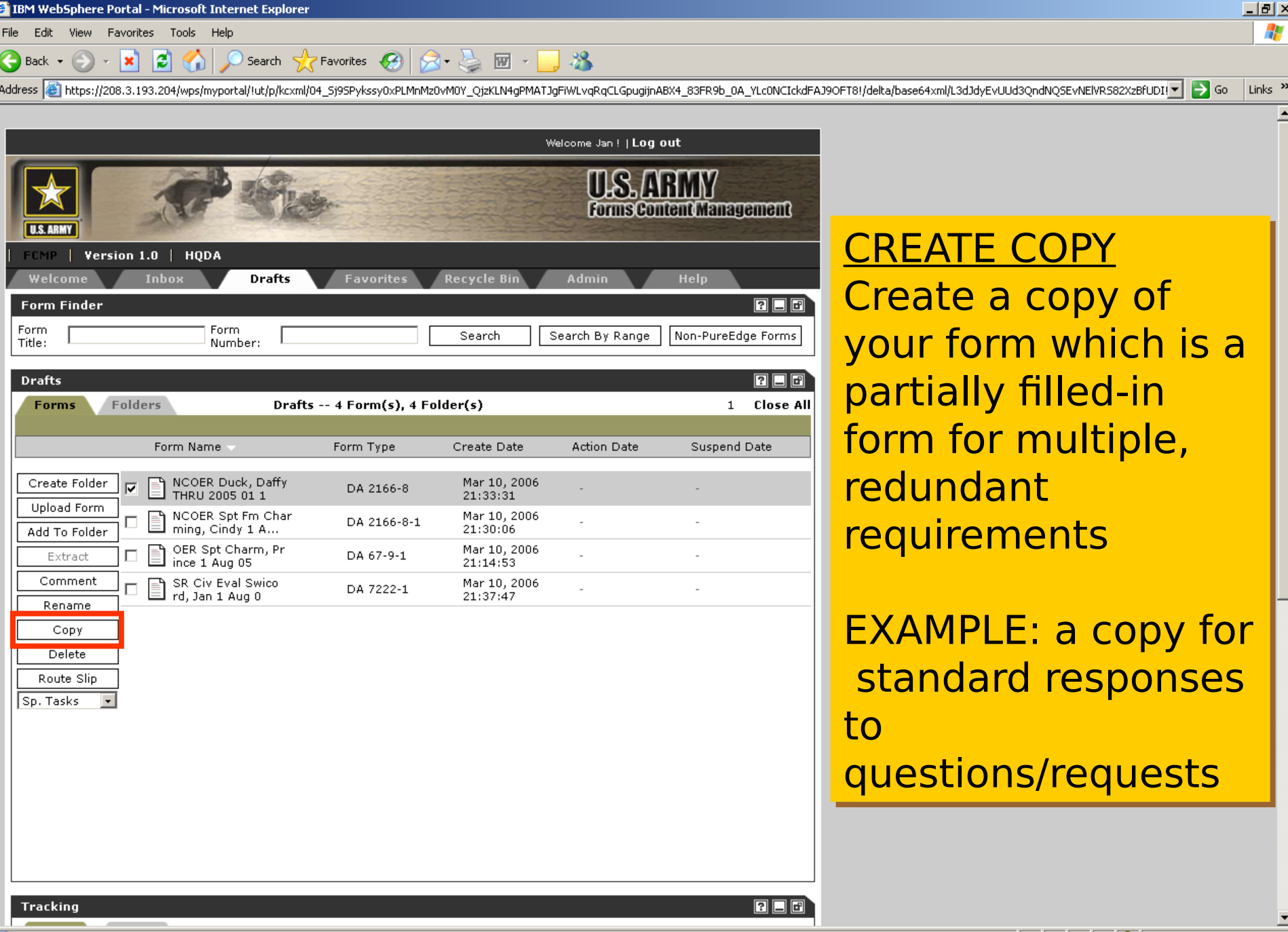


Tracking Portlet

- provides visibility on forms that the user has "touched"
- includes Info Copy forms that have been sent to user
- tells user who is the current "owner" and for how long

We expect a wide variety of management reports can be produced from this section alone.

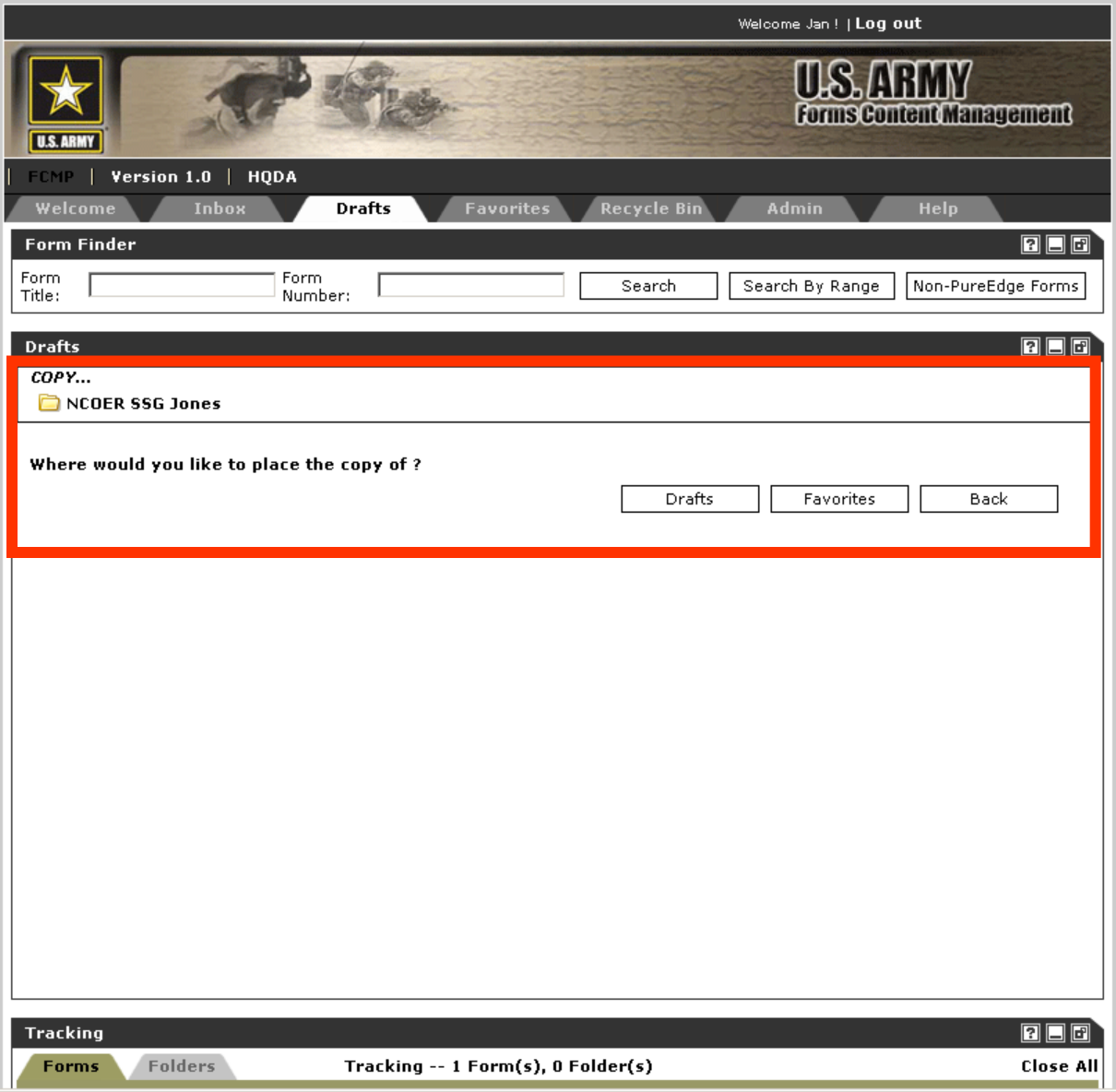
Coming Soon: Management reports_



CREATE COPY

Create a copy of your form which is a partially filled-in form for multiple, redundant requirements

EXAMPLE: a copy for standard responses to questions/requests



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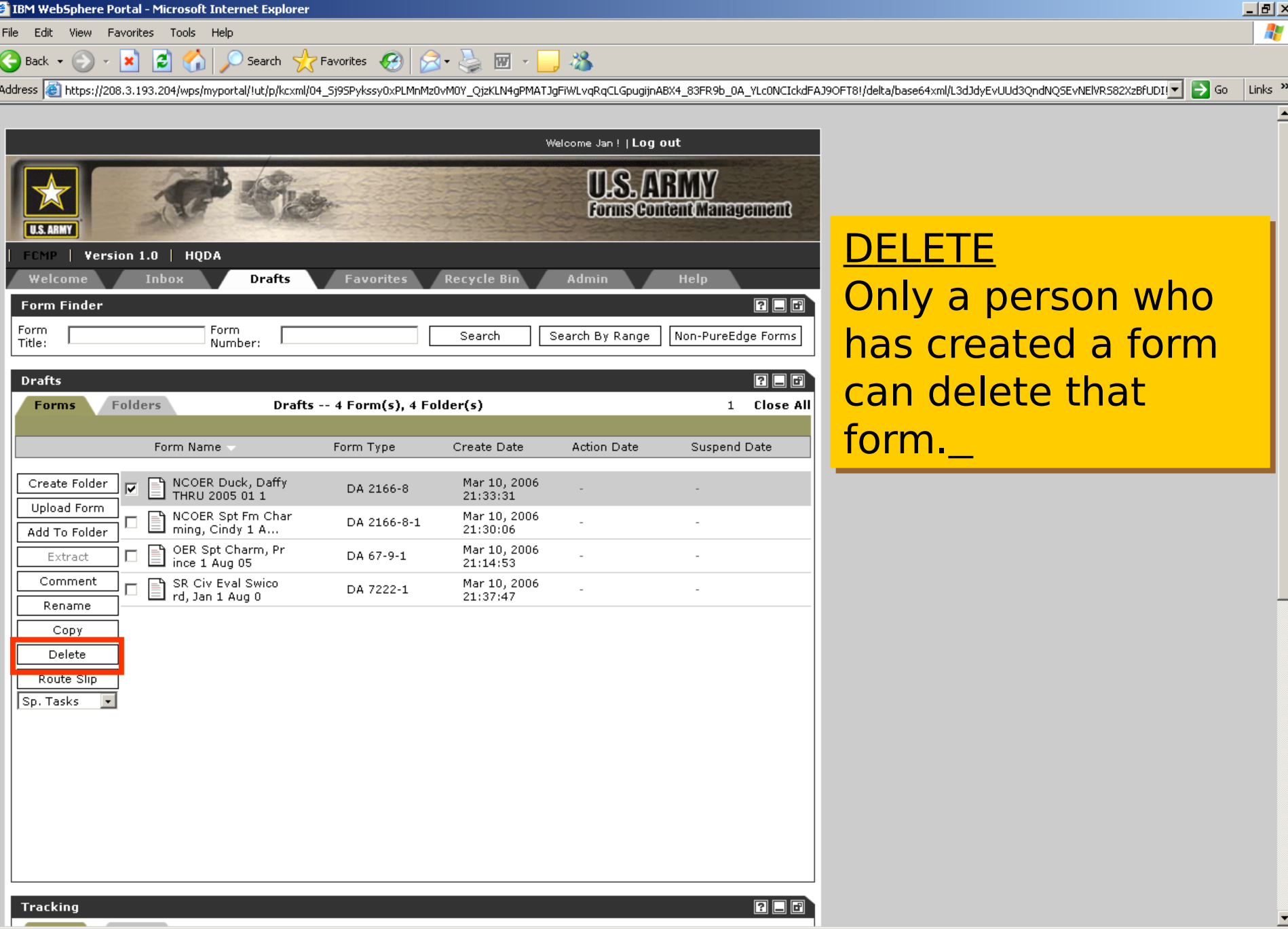
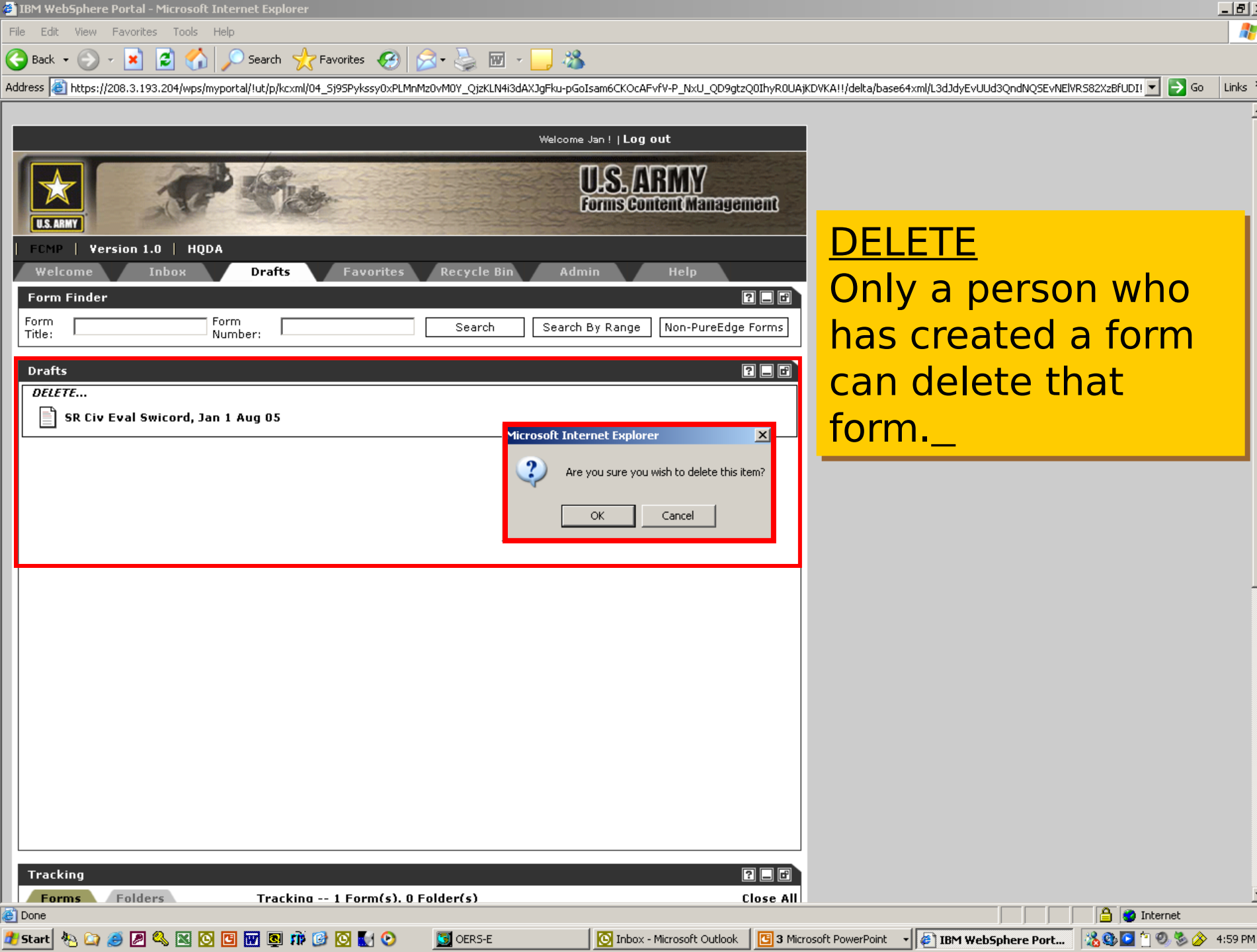


DELETE

Only a person who has created a form can delete that form._



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